



Introduction to the 2015 Texas Public Library Annual Report

Stacey Malek, Program Coordinator

Texas State Library and Archives Commission

Library Development and Networking Division

Tuesday, January 12, 2016, 2:00 PM



What's covered

- Reasons to report
- Rules, deadlines
- Accreditation
- Annual report
- Data collection portal
- Resources

Why Report?

“Without data, all you are is just another person with an opinion.” (Author Unknown)

- Participation in National Public Library Data Collection System
<https://www.ims.gov/research-tools/data-collection>
- Accreditation in Texas State Library System
- If you don't report, we have no information about your library!



Rules

Texas Administrative Code §1.71 - §1.86
**Minimum Standards for Accreditation of Public
Libraries in the State Library System**

<http://tinyurl.com/TACaccreditation>

Rules



Texas Administrative Code

TITLE 13	CULTURAL RESOURCES
PART 1	TEXAS STATE LIBRARY AND ARCHIVES COMMISSION
CHAPTER 1	LIBRARY DEVELOPMENT
SUBCHAPTER C	MINIMUM STANDARDS FOR ACCREDITATION OF LIBRARIES IN THE STATE LIBRARY SYSTEM

Rules

§1.71	Definition of Population Served
§1.72	Public Library Service
§1.73	Public Library: Legal Establishment
§1.74	Local Operating Expenditures
§1.75	Nondiscrimination
§1.77	Public Library: Local Government Support
§1.79	Provisional Accreditation of Library
§1.80	Probational Accreditation of Library
§1.81	Quantitative Standards for Accreditation of Library
§1.82	Accreditation Based on Current Operating Budget
§1.83	Other Requirements
§1.84	Professional Librarian
§1.85	Annual Report
§1.86	Standards for Accreditation of Libraries Operated by Public School Districts, Institutions of Higher Education, Units of Local, State, or Federal Government, Accredited Non-Public Elementary or Secondary Schools, or Special or Research Libraries

§1.71 – Population Assignment

- Assigned by sources of governmental entity funding: city, county, school district
- Multiple libraries in a county that receive city and county revenue have population assigned in proportion to city size, as compared to county
- Not based on geography



§1.85 - Deadlines

Texas Administrative Code §1.85 Annual Report

*“A public library shall file a current and complete annual report with the Texas State Library and Archives Commission **by April 30**. Revisions to the annual report which would affect membership status for the next fiscal year will not be accepted after **July 31...**”*

Target ►►► **MARCH 31, 2016**



Resources

- Annual Report webpage, Texas State Library
<https://www.tsl.texas.gov/landing/statistics.html>
- LibPAS – data collection portal:
<https://tx.countingopinions.com/main.php>



Resources

Library Development & Networking (LDN)

800-252-9386 toll free, in Texas

Valicia Greenwood, Library Statistics Specialist
valicia.greenwood@tsl.texas.gov, 512-463-5466

Stacey Malek, Program Coordinator
stacey.malek@tsl.texas.gov, 512-463-5532

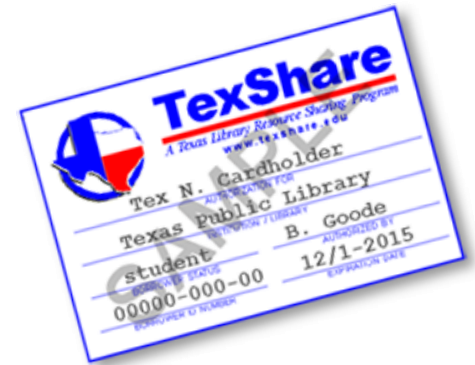
QUESTIONS



Accreditation Benefits

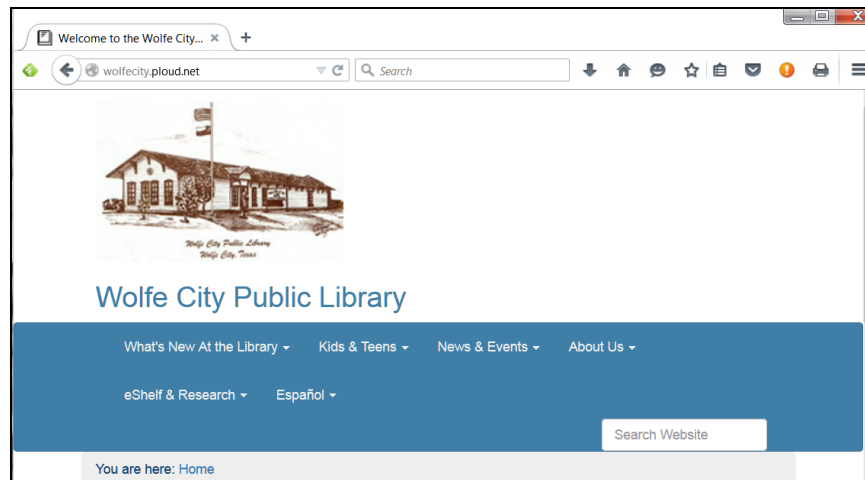


- TexShare card
- TexShare databases
- Interlibrary Loan ILL
- E-rate
- Competitive grants



Accreditation Criteria

- Contact criteria
 - Published phone
 - Website



Accreditation Criteria

- Financial criteria
 - Expenditure criteria
 - Maintenance of Effort (MOE)
 - Government support



Maintenance of Effort

§1.74 – Local Operating Expenditures

Question **4.2**: Local Funds used for
Library Operating Expenditures

- 3-year average
- Calculated two ways
- Exemption amount

Maintenance of Effort

Look it up!

<https://www.tsl.texas.gov/ld/pubs/arsma/index.html>

2015 Annual Report Blank Worksheet

[Word format](#) | [PDF format](#)

2015 Application Form for Accreditation in State Library System

[Word format](#) | [PDF format](#)

Tips and Tools

Tip sheet: Reporting Downloadables

[Word format](#) | [PDF format](#)

[Population & MOE Planning Tool](#)(.xlsx)

A quick view of your library's population assignment and MOE for local fiscal year 2015 (question 4.2).

NOTE: May need to "Enable Editing" in Excel after downloading. Contact [staff](#) regarding issues or questions about

[Weekly Total Tool](#) (.xls)

A simple calculator for libraries with branches to determine unduplicated hours (question 11.3).

Indirect Costs Information

Indirect costs can be included when a library fails to meet Maintenance of Effort. An indirect cost is a cost incurred assigned to the library's budget, but paid for by a local government agency on behalf of the library.

Indirect Cost Examples - [Word format](#) | [PDF format](#)

Indirect Cost Documentation Sample - [Word format](#) | [PDF format](#)

Accreditation Appeal

Public libraries that do not meet certain accreditation criteria have the option to appeal loss of accreditation. Appeals (LSAB) at their summer meeting. The board makes a recommendation to the Director and Librarian, who either support or not be favorable to the library, the library can appeal directly to the commission at their summer meeting.

Accreditation Criteria

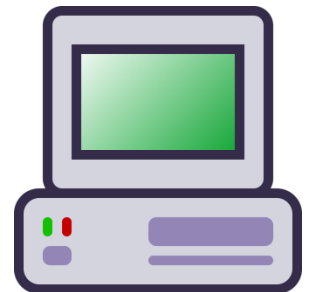
RULE §1.81: Per capita minimums, by population category FY15 and FY16

Library population Assignment	FY2015	FY2016
500,001+	\$13.82	\$13.89
200,001 – 500,000	\$11.95	\$12.01
100,001 – 200,00	\$9.60	\$9.79
50,001 – 100,000	\$8.00	\$8.16
25,001 – 50,000	\$5.31	\$5.42
10,001 – 25,000	\$4.25	\$4.34
5,001 – 10,000	\$3.97	\$4.05
1 – 5,000	\$3.70	\$3.77

Accreditation Criteria

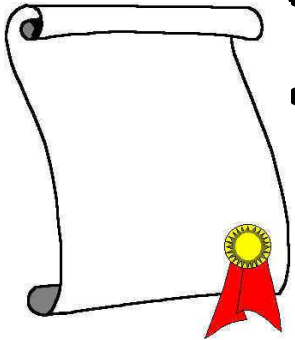
■ Service criteria

- Searchable catalog
- # Items in collection, how current
- Long-range plan
- Copier, computer for staff and public
- Interlibrary loan (ILL)
- Hours library available to public



Accreditation Criteria

- Librarian qualification criteria
 - Professional librarians (libraries serving more than 25,000 persons)
 - Number of hours employed
 - Continuing Education requirement



QUESTIONS





Texas Public Library Annual Report

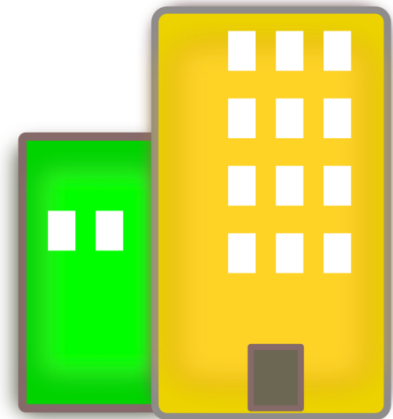
- Basic facility information for central library
- Financial information
- Library operation statistics

Basic Facility Information

Section 1 - Contact information

Section 2 - Number of outlets,
square footage

- Branch information will be reported in Section 12



Financial Information



Section 3 – Expenditures

**REPORT ACTUAL EXPENDITURES,
NOT BUDGETED AMOUNTS**

Financial Information

Section 3 – Expenditures



3.1-3.11 Library Operating Expenditures

3.1 - 3.3 Staffing Expenditures

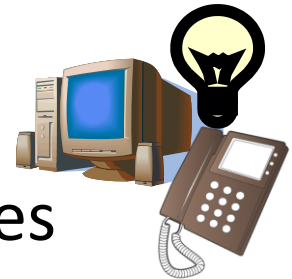
3.4 - 3.7 Collection Expenditures



Financial Information

Section 3 – Expenditures

3.8 Other Operating Expenditures



3.12 Library Capital Expenditures



New question

3.0 Did the library expend any funds from sources *outside the library's home county* such as Tocker Foundation, Dollar General, Hancher Foundation, Texas Book Festival, NEA, or similar sources?

If **Yes**, include in Section 3, but not in Section 4.

If **No**, include all expenditures from Section 3 in Section 4.

Financial Information

Section 4 – Local Financial Effort

- **4.1** Local funds used for collection materials

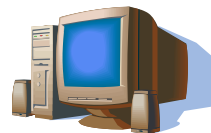
Exclude grants from outside library's home county



Financial Information

Section 4 – Local Financial Effort

- **4.2** Local funds used for library operating expenditures - Used for calculating **MOE**
- **4.3** Local government funds used for library operating expenditures - Accreditation criteria



Financial Information

Section 5 – Revenues



Report revenues when received, whether expended (used) or not .

Financial Information

Section 5 – Revenues

5.1 – 5.12 Revenues used for library *operation*

5.9 Grants – Local and non-local. **Indicate Source!**

5.10 Other local sources of funding – Friends, donations, fines, fees, etc. No “in kind” amounts



Financial Information

Section 5 – Revenues

5.13 – 5.21 Revenues used for *capital* expenditures

5.22 – 5.23 Revenue sources *outside* home county

Skip question if all revenue came from local sources.

Library Operation

Section 6 – Library Collection

- Physical materials: titles vs items
- Downloadable materials: library vs consortium
- Databases
- Totals
- One percent



Library Operation

Section 7 – Services

- Long-range plan
- Reference transactions
- Library visits
- Users
- Circulation: Physical vs digital
- Programs: Events and Attendance



Library Operation

Section 8 – Staffing

- Hours worked
- Director/head librarian's salary and Continuing Education

<https://www.tsl.texas.gov/ld/librarydevelopments/>

- Equipment available to staff



Library Operation

Section 9 – Resource Sharing

<https://www.tsl.texas.gov/landing/ill.html>

Accreditation issue – Statewide ILL

Contact: Sara Hayes, ILL Coordinator

sara.hayes@tsl.texas.gov,

512-463-5406



Library Operation

Section 10 – Internet and Computer Use

Accreditation issue: website

Contact: Henry Stokes, Library Technology
Consultant

henry.stokes@tsl.texas.gov 512-463-6624



Library Operation

Section 11 – Library Hours

Accreditation issue: unduplicated hours

Weekly Total Hours Calculator - COMPOSITE NUMBER OF HOURS								
<p>This chart is provided as an aid in calculating the total number of hours of library service provided by your main library and branches. Place a "1" in the space for each hour in which <u>one or more</u> of your library facilities is open. If a library is open only part of a given hour, enter "1/2", "3/4", etc. Add each column to determine the weekly total for a regular week. Report the totals in the spaces below, and then the total Weekly Total Amount in 11.5.</p>								
TIME	SUN	MON	TUES	WED	THUR	FRI	SAT	
7:00 - 8:00 a.m.								
8:00 - 9:00 a.m.								
9:00 - 10:00 a.m.								
10:00 - 11:00 a.m.								
11:00 - 12:00 a.m.								
12:00 - 1:00 p.m.								
1:00 - 2:00 p.m.								
2:00 - 3:00 p.m.								
3:00 - 4:00 p.m.								
4:00 - 5:00 p.m.								
5:00 - 6:00 p.m.								
6:00 - 7:00 p.m.								
7:00 - 8:00 p.m.								
8:00 - 9:00 p.m.								
9:00 - 10:00 p.m.								
DAILY TOTALS	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00 <= WEEKLY TOTAL



Application for Accreditation

Application form is found on

- Blank worksheet forms
- <https://tx.countingopinions.com/main.php>
- <https://www.tsl.state.tx.us/ld/pubs/arsma/index.html>



ACCREDITATION IN STATE LIBRARY SYSTEM APPLICATION

Local Fiscal Year 2015

This form must be completed by public libraries applying for accreditation in the State Library System and submitted on or before April 30, 2016.

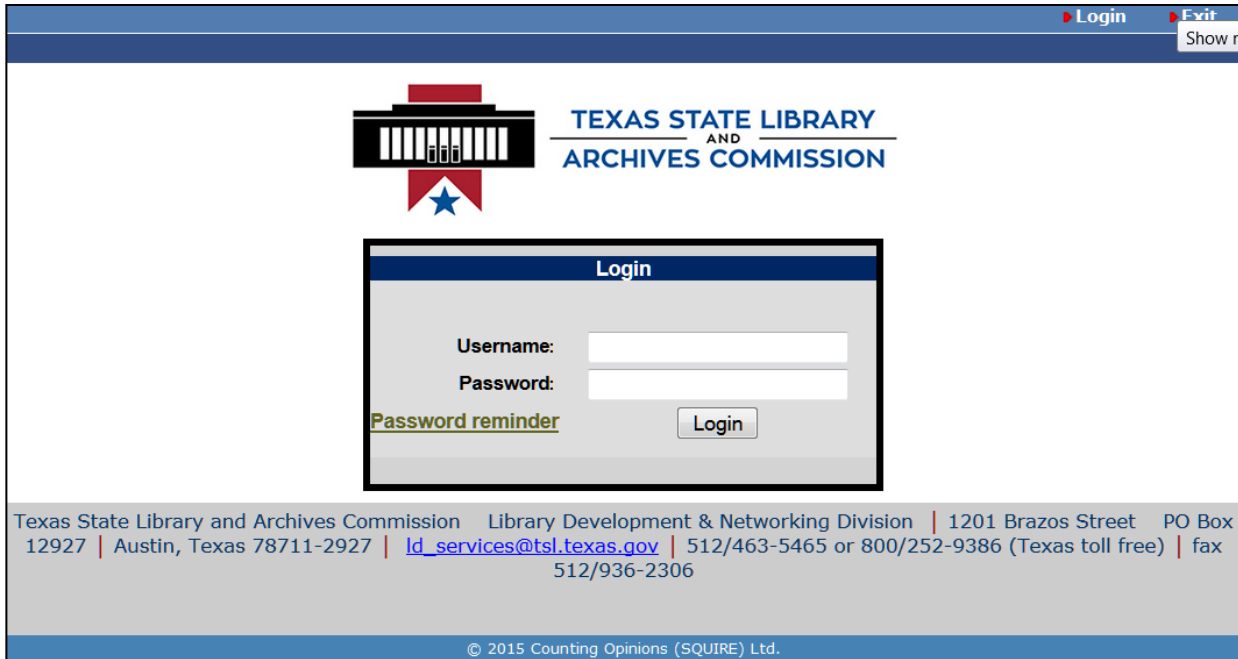
QUESTIONS



Online Data Collection

LibPAS

<https://tx.countingopinions.com/>



The screenshot shows a web browser window with a blue header bar containing 'Login' and 'Exit' buttons. The main content area features the Texas State Library and Archives Commission logo on the left and the text 'TEXAS STATE LIBRARY AND ARCHIVES COMMISSION' on the right. Below this is a 'Login' form with a blue header. The form contains two input fields: 'Username:' and 'Password:'. Below the 'Password:' field is a link for 'Password reminder' and a 'Login' button. The footer of the page contains contact information for the Texas State Library and Archives Commission, Library Development & Networking Division, including the address, phone numbers, fax, and email.

TEXAS STATE LIBRARY
AND
ARCHIVES COMMISSION

Login

Username:

Password:

[Password reminder](#)

Texas State Library and Archives Commission | Library Development & Networking Division | 1201 Brazos Street | PO Box 12927 | Austin, Texas 78711-2927 | ld_services@tsl.texas.gov | 512/463-5465 or 800/252-9386 (Texas toll free) | fax 512/936-2306

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Home Page

Welcome Texas Public Library

Click on the Enter button below to complete the online survey form



Enter

Forms, Tools and Tips for Texas Public Libraries Annual Report

Forms

- ◆ [Blank Annual Report Worksheet](#)
- ◆ [Application form for Accreditation in State Library System](#)

Tools

- ◆ [Population & MOE Planning Tool](#)
- ◆ [Weekly Total Tool](#)

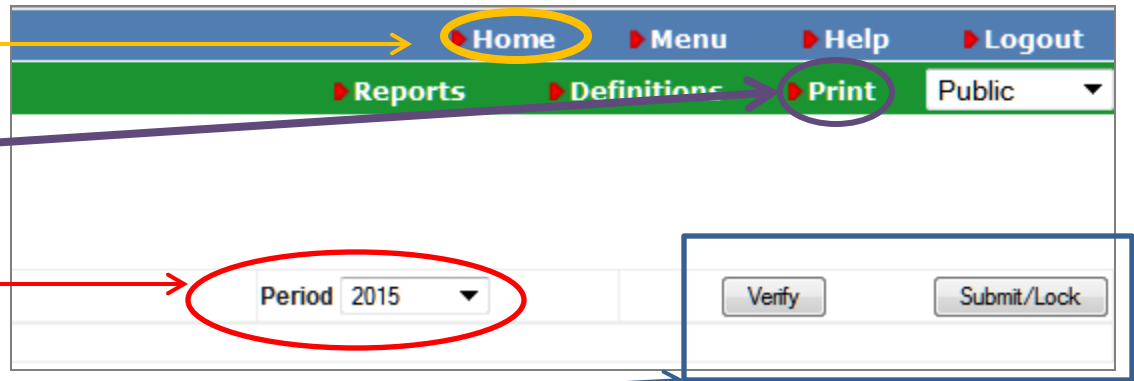
Tips

- ◆ [Reporting Downloadables](#)
- ◆ [How to use the Online Form](#)
- ◆ [Public Library Annual Report Webpage](#)

Data Input

Form features

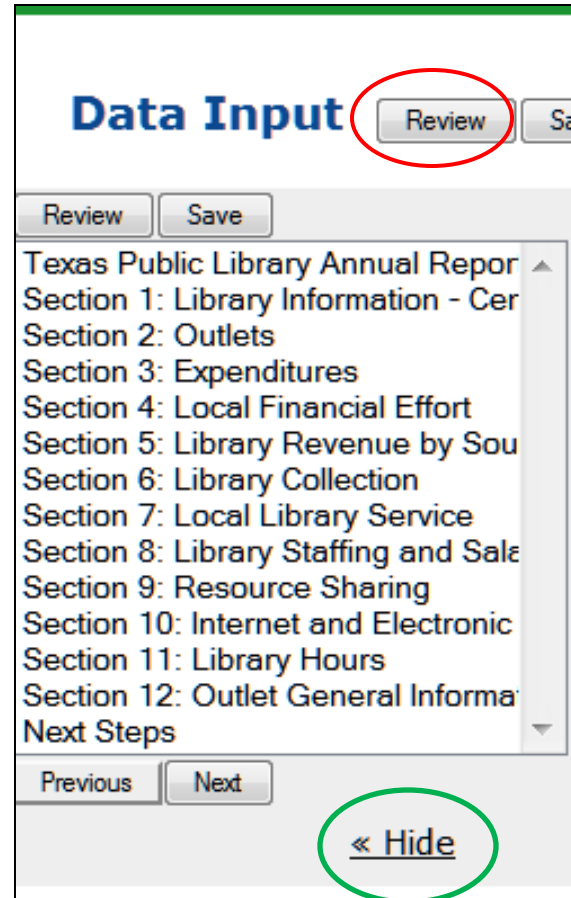
- Home
- Print
- Period
- Submit Form



The screenshot shows a web form interface with a blue header bar containing links: Home, Menu, Help, and Logout. Below this is a green bar with links: Reports, Definitions, and Print. A dropdown menu on the right shows 'Public'. The main content area has a 'Period' dropdown menu set to '2015'. To the right of the dropdown are two buttons: 'Verify' and 'Submit/Lock'. Annotations include a yellow arrow pointing from 'Home' in the list to the 'Home' link in the header, a purple arrow pointing from 'Print' in the list to the 'Print' link in the green bar, a red arrow pointing from 'Period' in the list to the 'Period' dropdown menu, and a blue arrow pointing from 'Submit Form' in the list to the 'Submit/Lock' button. The 'Home' link, the 'Print' link, and the 'Period' dropdown are each circled in their respective colors.

Data Input

- Navigation



The screenshot shows a web form titled "Data Input". At the top right, there are two buttons: "Review" (circled in red) and "Save". Below the title, there is a section with two buttons: "Review" and "Save". The main content area is a scrollable list of sections: "Texas Public Library Annual Report", "Section 1: Library Information - Cer", "Section 2: Outlets", "Section 3: Expenditures", "Section 4: Local Financial Effort", "Section 5: Library Revenue by Sou", "Section 6: Library Collection", "Section 7: Local Library Service", "Section 8: Library Staffing and Sale", "Section 9: Resource Sharing", "Section 10: Internet and Electronic", "Section 11: Library Hours", "Section 12: Outlet General Informa", and "Next Steps". At the bottom, there are two buttons: "Previous" and "Next". In the bottom right corner, there is a button labeled "<< Hide" (circled in green).

Data Input

- Annotations
- Definitions

Include all operating expenditures from the library budget for microform, electronic, and other formats considered part of the library collection. Exclude charges or fees for document delivery.

3.4 Print Materials Expenditures ✓


Indicator Notes

This is often useful for recording details about interpretation of the definition in local terms. Examples: who to contact for information, a translation of the text, etc.

Questions (indicator)	Print Materials Expenditures
Definition	Books, serial back files, current serial subscriptions, government documents, and any other print acquisitions.

Data Input

Use annotations/notes/explanations!

Edit check 

Current Value:	\$0
Previous period value:	\$37,069,702

EDIT CHECK:
PRINT MATERIALS EXPENDITURES prior year is greater than 15,500 and current year is zero. Please check the current year value for possible error or provide an explanation for the change.

To Accept this value, please provide/select an explanatory Note, otherwise select Cancel to update the value.

4 **Print Materials Expenditures** ✓



Data Input

PI Value Notes ✕

3.4 Print Materials Expenditures

Input note here to explain the anomalous value, or select any existing note(s) (shown below, if applicable) to apply the selected note to the PI value.

Notes

Add

Cancel

Reports

▶ Home	▶ Menu	▶ Help	▶ Logout
▶ Reports	▶ Definitions	▶ Print	Public ▼
.			
Period	2015 ▼	Verify	Submit/Lock

Reports

Manage Reports

To generate a report, select an existing report by *Name* (below) or use the [Library Trend](#) and/or [Ranking Report](#) links from the navigation bar (above).

Use the [Add](#) button to *Create* a new report in a *Local* folder.

To Move or Remove one or more reports, select the report(s) (use the checkbox in the first column) and ...

Use the **Remove** button to *remove* the report(s) that you previously created.

Use the **Move** button to *move* the report(s) to another local folder that you previously created.

Published Reports (see below) are available to *share* with anyone, using the associated URL.

Local

TX

Annual Statistics

Demo Reports

Merge Documents

Report Name	Report Type	Collection	Description	Updated
2012 Branch Statistics	Table	Texas Outlet Data Texas Public Libraries Annual Report	published	2014-09-11 12:19:24
2012 Texas Public Library Statistics	Table	Texas Public Libraries Annual Report	published	2014-09-11 12:19:06
2013 Branch Statistics	Table	Texas Public Libraries Annual Report Texas Outlet Data	published	2014-09-11 12:18:21
2013 Texas Public Library Statistics	Table	Texas Public Libraries Annual Report	published	2014-09-11 12:18:39
2014 Branch Statistics	Table	Texas Public Libraries Annual Report Texas Outlet Data	published	2015-08-06 14:43:46
2014 Texas Public Library Statistics	Table	Texas Public Libraries Annual Report	published	2015-10-23 11:53:47

Reports

[Data Input](#)
[Manage Collections](#)
[Copy Pls](#)
[Import](#)
[Export](#)
[Library Trend](#)
[Ranking Report](#)

Manage Reports

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Local

TX

Annual Statistics

Demo Reports

Merge Documents

Report Name	Report Type	Collection	Description	Updated
2011 Library Snapshot	DOCUMENT	Texas Public Libraries Annual Report	This is a snapshot of the library's local fiscal year 2011 data, as reported to the Texas State Library and Archives Commission. The document needs to be saved as a Word document (*.docx preferred), once it is downloaded.	2013-10-15
2012 Library Snapshot	DOCUMENT	Texas Public Libraries Annual Report	This is a snapshot of the library's local fiscal year 2012 data, as reported to the Texas State Library and Archives Commission. The document needs to be saved as a Word document (*.docx preferred), once it is downloaded.	2013-10-21
2013 Library Snapshot	DOCUMENT	Texas Public Libraries Annual Report	This is a snapshot of the library's local fiscal year 2013 data, as reported to the Texas State Library and Archives Commission. The document needs to be saved as a Word document (*.docx preferred), once it is downloaded.	2015-09-01
2013 Two-Year Comparison Report	DOCUMENT	Texas Public Libraries Annual Report	This three-page report lists the data from local fiscal year 2012 and 2013, as reported to the Texas State Library and Archives Commission. The document needs to be saved as a Word document (*.docx preferred), once it is downloaded.	2014-12-10
2014 Two-Year Comparison Report	DOCUMENT	Texas Public Libraries Annual Report	This three-page report lists the data from local fiscal year 2013 and 2014, as reported to the Texas State Library and Archives Commission. The document needs to be saved as a Word document (*.docx preferred), once it is downloaded.	2015-09-03

QUESTIONS



Data collection portal



Contact Us!

Library Development & Networking

ld_services@tsl.texas.gov, 800-252-9386

Valicia Greenwood, Library Statistics Specialist

valicia.greenwood@tsl.texas.gov, 512-463-5466

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